

*Statewide and Regional
Tourism Facts and Figures*

California Fast Facts 2006



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California
TOURISM

Fall 2006



Chip Morton Photography

Temecula Valley Balloon Festival



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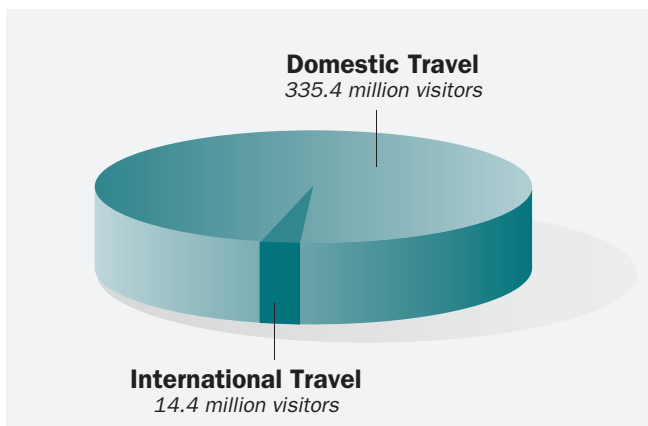
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Executive Summary

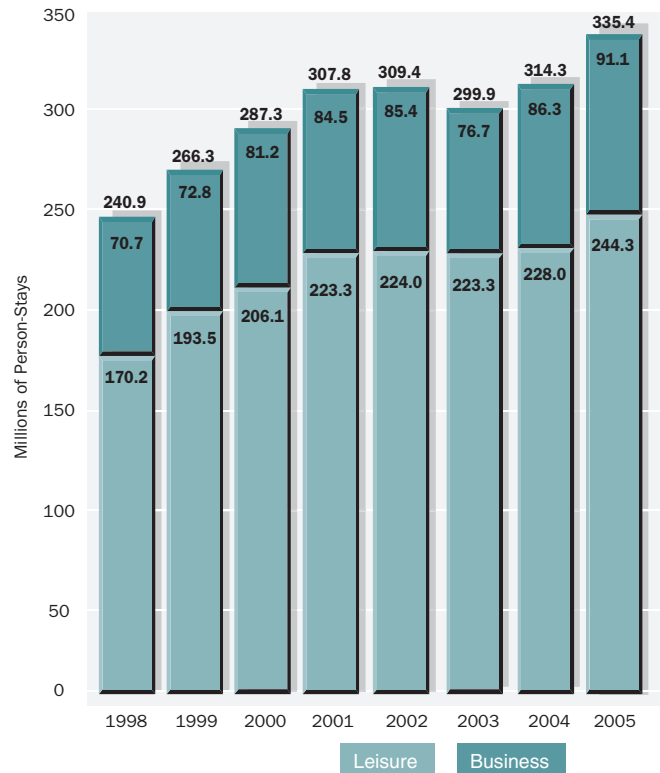
- Total direct travel spending in California was \$88.1 billion in 2005, a 7.6 percent increase over the preceding year. This is the third straight year of positive growth and the greatest increase since 2000.
- There were 29.8 million domestic air passenger visitor arrivals to California in 2005, an increase of 2.6 percent over 2004.
- California was the destination of 335.4 million domestic leisure and business travelers in 2005 and approximately 14.4 million international travelers, making it the most visited state in America.
- Californians themselves are the mainstay of the state's travel and tourism industry, comprising 83 percent of domestic travel, or 279.8 million person-stays. Out-of-state visitors account for 55.5 million person-stays. California's top domestic markets in 2005 were Arizona (contributing approximately 9.1 million person-stays), Nevada (7.4 million), Texas (4.0 million), Oregon (3.4 million), Washington (2.7 million), and Illinois (2.3 million).
- Of California's 14.4 million international visitors, 4.8 million travel from overseas. 2005 was the second year in a row to show a net gain since 2000. The top seven overseas visitor markets are: United Kingdom (778,000 visitors), Japan (722,000), Australia (313,000), Germany (309,000), France (261,000), South Korea (252,000), and Taiwan (191,000). Mexico and Canada account for more visitors than all overseas combined: 496,000 Mexican air travelers, roughly 8.1 million Mexican visitors traveling to and through California by land, (including 4.8 million day visitors) and 1.1 million Canadians.
- California garnered a 11.1% market share of total U.S. domestic travel in 2005, and 22.1% of all overseas travel to America.
- Dining, shopping and entertainment are the most popular expenditure based activities among California travelers. Sightseeing, followed by visiting theme and amusement parks, and beach and waterfront activities, are the most popular recreational pursuits.
- Tourism helps diversify and stabilize rural economies. On the average, each California county earns approximately \$1.3 billion per year in direct travel expenditures by visitors.
- New travel and hospitality industry construction totaled \$1.4 billion in 2005, 39 percent above 2004 levels, and represents 7.6 percent of all non-residential construction in California. This investment supported 24,000 jobs.

Total Travel To and Through CA, 2005



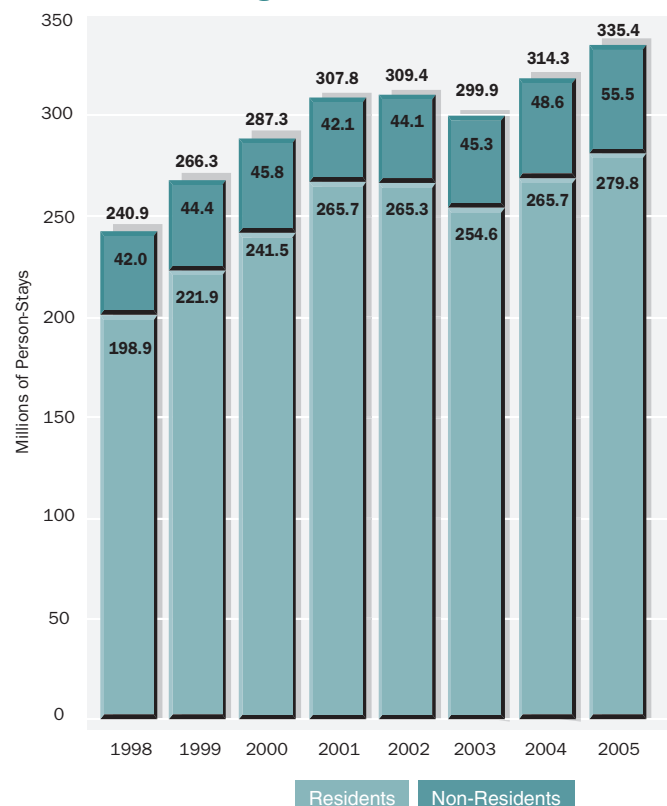
Sources: D.K. Shifflet & Associates, Ltd., CIC Research, Inc. and California Tourism, 2006

Business and Leisure Travel To and Through California



Source: D.K. Shifflet & Associates, Ltd., 2006

Resident and Non-Resident Travel To and Through California



Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitors to California Top Originating States (Millions of person-stays)

	2003	Volume 2004	2005
Arizona	5.7	6.6	9.1
Nevada	6.6	7.9	7.4
Texas	3.6	4.7	4.0
Oregon	3.0	2.8	3.4
Washington	2.4	1.9	2.7

Source: D.K. Shifflet & Associates, Ltd., 2006

The Economic Impact of Travel

The multi-billion dollar travel industry in California is a vital part of the state and local economies. The industry is represented primarily by retail and service firms, including lodging establishments, restaurants, retail stores, gasoline service stations, and other types of businesses that sell their products and services to travelers.

During 2005, travelers to California contributed an estimated \$88.1 billion to the state economy. This spending directly supported 911,800 jobs, up 5.4% from 2004, and generated \$1.9 billion in local taxes and \$3.4 billion in state taxes, of which approximately \$513 million was tax revenue from motor fuel. On average, every \$96,600 spent by travelers supports one California job.

Selected Activities of Resident and Non-Resident Leisure Travelers (Millions of person-stays)

	CA Residents	Non-Residents
Dining	76.3	15.2
Shopping	59.8	12.6
Entertainment	53.6	12.6
Sightseeing	45.4	12.6
Theme/Amusement Parks	26.8	7.6
Beach/Waterfront	20.6	5.7
Nightlife	14.4	2.7
Nat'l/State Parks	12.4	3.4
Visit Historic Site	8.2	2.3
Camping	6.2	0.8
Golf	2.1	0.8
Snow Skiing	2.1	0.4
Group Tour	6.2	1.5
Museum/Art Exhibit	10.3	3.0
Nature/Culture/Eco	6.2	1.9

Source: D.K. Shifflet & Associates, Ltd., 2006

California Direct Travel Impacts, 1994-2005p

Year	Spending (\$Billion)	Earnings (\$Billion)	Jobs (Thousand)	Tax Receipts		
				Local (\$Billion)	State (\$Billion)	Federal (\$Billion)
1994	54.0	16.8	793	1.1	2.0	2.9
1995	55.4	17.4	810	1.1	2.1	2.9
1996	60.2	18.7	845	1.3	2.3	3.1
1997	65.5	20.2	885	1.4	2.5	3.3
1998	67.8	21.6	890	1.5	2.6	3.4
1999	72.2	23.0	927	1.6	2.8	3.6
2000	78.0	24.8	940	1.8	2.9	3.9
2001	74.7	24.3	873	1.7	2.8	4.1
2002	74.0	24.5	856	1.6	2.8	4.2
2003	76.8	25.2	875	1.7	2.9	4.2
2004	81.9	26.5	890	1.8	3.1	4.4
2005p	88.1	28.0	912	1.9	3.4	4.6
Annual Percentage Change						
04-05p	7.6	5.4	2.5	9.2	7.3	5.0

Estimates for 2005 are preliminary. All previous estimates have been revised. Earnings include payroll, other earned income and proprietor income. Employment includes payroll employees and proprietors.

Source: Dean Runyan Associates, Inc., 2006

Overseas Visitors to California

Overseas Country of Residence	2004	2005	% change 04/05
Total Overseas	4,200,000	4,800,000	14.3%
United Kingdom	693,000	778,000	12.30%
Japan	630,000	722,000	14.60%
Australia	259,000	313,000	20.80%
Germany	275,000	309,000	12.40%
France	215,000	261,000	21.40%
South Korea	273,000	252,000	-7.70%
Taiwan	177,000	191,000	7.90%
China	101,000	146,000	44.60%
Philippines	109,000	116,000	6.40%
Netherlands	115,000	114,000	-0.90%

Source: CIC Research, Inc.; California Tourism, 2006

Local and State Tax Receipts Generated by Travel Spending, 2005p

(\$ Millions)	
Total Local	1,933
Transient Occupancy Tax	1,128
Local Sales685
Total State	3,369
State Sales	2,200
State Gas Tax513
Income Taxes657
Total	5,303

Source: Dean Runyan Associates, Inc., 2006

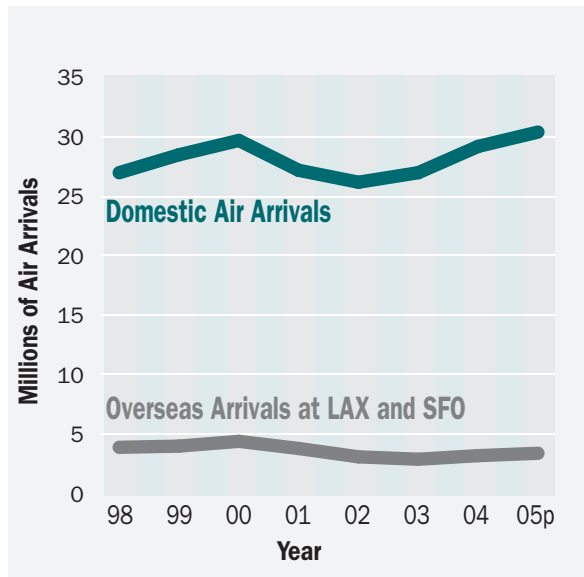
California Travel Impacts, 1994-2005p

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005p
Total Direct Travel Spending (\$Billion)												
Visitor Spending at Destination	47.9	49.7	54.2	59.2	61.7	66.1	71.3	68.3	68.0	71.0	76.0	82.0
Other Travel*	6.1	5.7	6.0	6.3	6.1	6.1	6.7	6.4	6.0	5.8	5.9	6.1
Total Direct Spending	54.0	55.4	60.2	65.5	67.8	72.2	78.0	74.7	74.0	76.8	81.9	88.1
Visitor Spending by Type of Traveler Accommodation (\$Billion)												
Hotel, Motel	22.1	23.2	25.9	28.9	31.0	33.7	36.6	35.1	34.6	36.3	39.4	42.9
Private Campground	1.8	1.8	2.1	2.4	2.2	2.3	2.5	2.6	2.6	2.7	2.9	3.2
Public Campground	0.4	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.6	0.6
Private Home	8.2	8.3	8.7	9.0	9.2	9.5	10.2	10.0	10.0	10.3	10.8	11.3
Vacation Home	2.5	2.5	2.6	2.7	2.7	2.8	2.9	3.1	3.1	3.2	3.4	3.6
Day Travel	12.9	13.4	14.5	15.7	16.2	17.3	18.5	17.0	17.1	18.0	19.0	20.4
Spending at Destination	47.9	49.7	54.2	59.2	61.7	66.1	71.3	68.3	68.0	71.0	76.0	82.0
Visitor Spending by Commodity Purchased (\$Billion)												
Accommodations	7.6	8.0	8.9	9.9	10.6	11.5	12.6	12.1	11.6	11.9	12.9	14.2
Food & Beverage Services	11.2	11.7	12.6	13.9	14.7	15.7	16.4	15.8	16.4	17.2	18.4	19.7
Food Stores	1.6	1.7	1.8	2.0	2.1	2.2	2.3	2.3	2.3	2.4	2.6	2.7
Gournd Tran. & Motor Fuel	6.3	6.5	7.1	7.7	7.4	8.3	9.7	9.1	8.7	10.2	11.8	14.0
Arts, Entertainment & Recreation	8.3	8.8	9.5	10.4	11.0	11.8	12.4	12.0	12.2	12.7	13.3	13.7
Retail Sales	9.8	10.3	11.2	12.2	12.8	13.7	14.4	13.8	13.7	13.8	14.1	14.6
Air Transportation (visitor only)	3.1	2.8	3.0	3.1	3.0	3.1	3.4	3.1	3.0	2.8	3.0	3.1
Spending at Destination	47.9	49.7	54.2	59.2	61.7	66.1	71.3	68.3	68.0	71.0	76.0	82.0
Industry Earnings Generated by Travel Spending (\$Billion)												
Accommodations & Food Service	7.1	7.5	8.2	9.0	9.8	10.6	11.5	10.9	11.3	12.0	12.9	14.0
Arts, Entertainment & Recreation	4.2	4.4	4.8	5.2	5.5	5.9	6.2	6.0	6.0	6.3	6.6	6.8
Retail**	1.7	1.8	1.8	1.9	2.0	2.1	2.3	2.4	2.4	2.4	2.5	2.6
Auto Rental & Ground Tran.	0.3	0.3	0.4	0.4	0.4	0.4	0.5	0.4	0.5	0.5	0.5	0.5
Air Transportation (visitor only)	0.7	0.7	0.7	0.7	0.8	0.8	0.9	1.0	1.0	0.9	0.9	0.9
Other Travel*	2.9	2.8	2.9	2.9	3.0	3.1	3.5	3.6	3.4	3.1	3.1	3.1
Total Direct Earnings	16.8	17.4	18.7	20.2	21.6	23.0	24.8	24.3	24.5	25.2	26.5	28.0
Industry Employment Generated by Travel Spending (Thousand Jobs)												
Accommodations & Food Service	403.0	412.9	438.4	457.6	467.5	491.0	506.6	463.7	465.3	487.9	500.0	518.0
Arts, Entertainment & Recreation	212.0	215.0	223.8	240.2	233.8	245.0	243.1	225.1	218.5	220.6	224.4	229.1
Retail**	84.4	86.4	85.0	87.6	87.8	89.6	87.6	87.0	85.0	86.9	87.6	88.1
Auto Rental & Ground Tran.	13.2	14.2	15.6	17.7	16.4	16.5	16.5	15.2	15.0	15.0	14.8	15.1
Air Transportation (visitor only)	15.5	15.7	16.2	16.1	17.0	17.6	18.2	17.5	15.4	13.5	13.2	13.0
Other Travel*	65.0	65.4	66.4	66.0	67.1	66.9	67.9	64.9	56.6	51.6	50.0	48.5
Total Direct Employment	793.0	809.5	845.3	885.2	889.6	926.6	939.9	873.5	855.8	875.5	890.0	911.8
Tax Receipts Generated by Travel Spending (\$Billion)												
Local Tax Receipts	1.1	1.1	1.3	1.4	1.5	1.6	1.8	1.7	1.6	1.7	1.8	1.9
State Tax Receipts	2.0	2.1	2.3	2.5	2.6	2.8	2.9	2.8	2.8	2.9	3.1	3.4
Federal Tax Receipts	2.9	2.9	3.1	3.3	3.4	3.6	3.9	4.1	4.2	4.2	4.4	4.6
Total Direct Tax Receipts	5.9	6.2	6.7	7.2	7.5	8.0	8.6	8.5	8.7	8.8	9.3	9.9

Note: Other Travel includes resident air travel and travel agency services. Total earnings include wage & salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors. Estimates for 2005 are preliminary (p). Local tax receipts include transient occupancy taxes and local sales taxes. State tax receipts include state sales taxes, motor fuel tax, and personal and corporate income taxes. Property taxes are not included. These estimates supersede all previous estimates released by California Tourism. Details may not add to totals due to rounding.

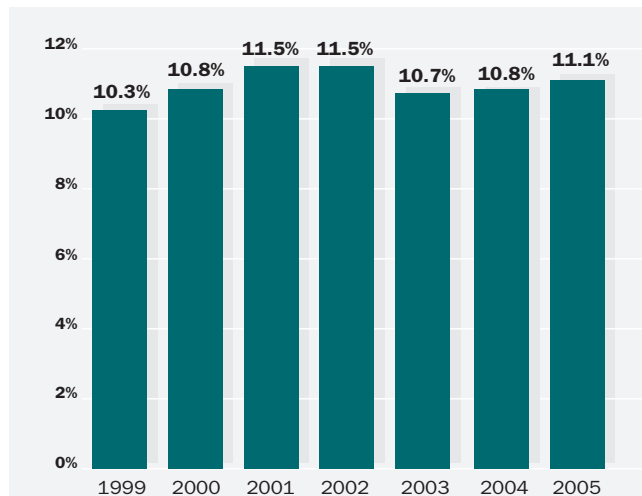
Source: Dean Runyan Associates, Inc., 2006

California Air Arrivals 1998-2005



Source: Dean Runyan Associates, Inc., 2006; Bureau of Transportation Statistics; CIC Research Inc., U.S. IATA, OTTI

California's Share of the U.S. Travel Market, 1999-2005



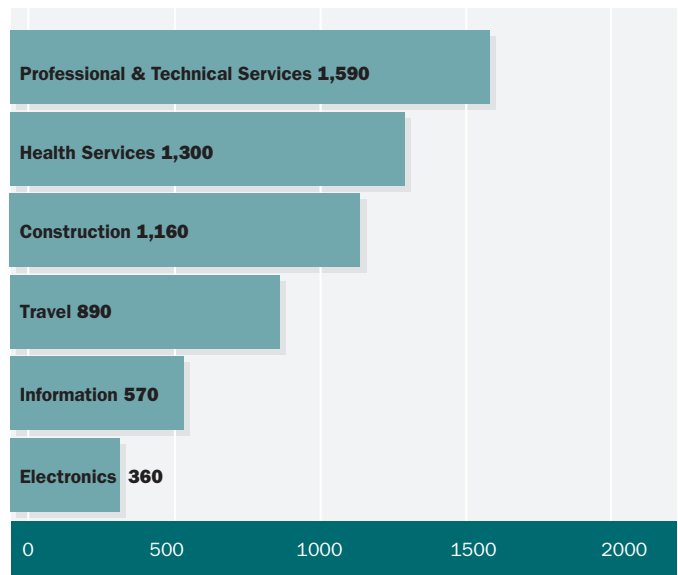
Source: D.K. Shifflet & Associates, Ltd., 2006

California International Visitor Origins 2005

Overseas	4,800,000
Mexico	8,596,000
Day visitors -	4,800,000
Land -	3,300,000
Air -	496,000
Canada	1,060,000
Total	14,456,000

Source: CIC Research, Inc. 2006

Industry Employment in California, 2004



Professional & Technical Services corresponds to NAICS Sector 54, Health Services - NAICS subsectors 621, 622, 623; Construction - Sector 23, Information - sector 51, Electronics - subsectors 334 and 335.
Source: Dean Runyan Associates, Inc., 2006, and U.S. Bureau of Economic Analysis

Impacts Generated by Travel Spending in California

	1999	2000	2001	2002	2003	2004	2005
Amount of Travel Spending to Support 1 Job	\$77,900	\$83,000	\$85,500	\$86,400	\$87,700	\$92,000	\$96,600
Tax Revenue Generated by \$100 Travel Spending							
Local	\$2.24	\$2.26	\$2.24	\$2.21	\$2.22	\$2.16	\$2.19
State	\$3.85	\$3.77	\$3.70	\$3.85	\$3.84	\$3.83	\$3.82

Source: Dean Runyan Associates, Inc., 2006

Total Travel Spending by County, 1994-2004 (\$Millions)

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Alameda	1,583.2	1,633.6	1,801.6	1,955.2	2,032.6	2,289.9	2,629.5	2,400.1	2,280.2	2,311.5	2,470.3
Alpine	18.3	18.5	20.6	22.4	22.2	24.0	24.7	25.9	26.8	26.7	27.9
Amador	57.2	61.5	67.7	72.5	70.6	74.8	80.1	92.7	100.1	101.6	103.8
Butte	146.4	153.0	159.6	163.1	169.9	179.4	193.0	191.8	194.0	201.9	215.8
Calaveras	93.9	97.6	100.3	104.5	107.8	117.1	120.8	125.1	127.4	131.9	140.3
Colusa	27.9	28.0	29.1	29.3	31.4	33.4	36.5	36.5	36.8	37.9	38.7
Contra Costa	675.3	705.6	754.9	830.4	873.0	943.7	1,038.7	977.5	942.7	997.7	1,071.7
Del Norte	70.5	68.9	72.4	77.0	73.8	79.2	81.4	82.6	84.1	84.9	89.4
El Dorado	449.8	455.7	462.1	484.4	502.1	528.1	541.2	542.5	552.2	595.2	611.9
Fresno	627.3	639.2	672.3	702.7	717.6	753.6	824.6	814.5	813.7	863.7	917.9
Glenn	28.6	29.7	31.8	32.9	33.8	36.1	39.4	38.9	39.1	41.4	44.4
Humboldt	197.8	202.3	205.0	210.0	212.5	228.5	241.6	240.1	244.3	248.6	257.6
Imperial	168.4	171.7	185.9	216.8	206.1	215.8	237.4	237.1	240.9	250.4	272.9
Inyo	113.0	119.4	127.4	139.1	137.5	142.5	150.3	148.7	155.7	162.7	171.3
Kern	718.6	704.2	744.0	812.7	813.0	834.8	897.2	889.9	882.3	923.3	989.1
Kings	74.2	77.3	81.8	86.7	90.0	96.1	105.0	104.3	107.4	112.0	118.3
Lake	98.0	101.6	105.9	109.9	110.5	119.0	128.0	135.1	137.7	139.9	145.9
Lassen	40.3	41.7	43.3	43.9	46.0	48.0	51.6	54.0	55.1	55.4	56.9
Los Angeles	13,305.4	13,453.2	14,510.9	15,572.3	15,913.5	16,822.3	18,258.4	17,478.5	17,240.2	17,937.7	19,295.4
Madera	119.5	125.5	135.5	142.9	143.0	153.3	163.0	165.8	168.7	175.5	185.8
Marin	351.3	369.2	397.2	437.1	458.6	504.8	550.8	529.7	526.8	528.7	596.6
Mariposa	212.4	210.7	194.4	208.3	225.1	231.5	241.5	260.6	269.5	277.0	288.8
Mendocino	216.9	229.6	230.9	240.5	250.0	266.6	286.1	286.2	294.4	294.0	299.5
Merced	119.7	118.8	119.9	124.9	128.0	138.7	152.7	150.7	150.4	160.6	170.2
Modoc	13.3	13.8	14.4	14.7	15.3	15.8	17.2	17.7	17.8	18.7	19.8
Mono	201.4	206.6	209.3	232.8	245.0	271.5	292.6	317.8	328.2	354.9	396.0
Monterey	1,250.3	1,326.2	1,467.6	1,574.1	1,645.1	1,813.9	1,887.1	1,856.8	1,834.5	1,843.8	1,896.0
Napa	411.0	452.8	490.4	538.5	572.7	592.0	633.7	647.0	663.4	666.5	736.1
Nevada	159.4	162.0	172.9	184.5	184.9	201.4	217.0	221.8	225.5	230.7	239.1
Orange	4,586.3	4,795.0	5,151.5	5,541.2	5,693.0	5,893.5	6,398.9	6,304.4	6,338.2	6,837.2	7,308.7
Placer	397.6	417.7	433.9	473.9	514.7	541.3	563.0	569.4	586.5	606.2	643.8
Plumas	71.3	73.8	76.6	77.4	82.8	84.5	89.7	95.2	97.3	98.1	98.8
Riverside	3,210.1	3,330.3	3,580.7	3,949.4	4,000.6	4,292.1	4,529.5	4,620.4	4,728.2	4,904.1	5,172.5
Sacramento	1,328.4	1,381.9	1,468.0	1,584.2	1,655.5	1,758.5	1,944.1	1,932.1	1,958.4	2,014.0	2,126.8
San Benito	50.7	52.1	57.5	62.1	64.1	70.0	75.2	73.9	73.8	75.5	75.6
San Bernardino	2,051.5	2,086.8	2,206.3	2,383.4	2,399.5	2,548.4	2,736.8	2,736.8	2,773.4	2,931.8	3,141.7
San Diego	5,299.5	5,463.6	6,292.0	7,209.6	7,755.6	8,220.7	8,872.6	8,571.3	8,593.8	9,014.0	9,540.4
San Francisco	6,647.9	6,638.3	7,293.0	7,875.4	8,027.5	8,665.5	9,228.2	8,178.2	7,897.7	8,064.7	8,677.5
San Joaquin	325.6	330.6	338.7	358.2	370.3	400.3	462.3	460.7	459.4	488.1	524.9
San Luis Obispo	633.5	635.3	690.5	735.2	774.6	834.5	909.9	896.7	902.3	930.5	970.0
San Mateo	1,498.0	1,631.9	1,820.8	2,034.4	2,135.4	2,245.9	2,384.7	2,038.2	1,971.9	2,024.5	2,136.9
Santa Barbara	821.7	855.9	906.8	971.3	1,024.0	1,097.2	1,169.4	1,167.8	1,178.6	1,218.9	1,283.9
Santa Clara	2,106.8	2,280.7	2,592.1	2,950.1	3,170.9	3,408.2	3,763.8	3,283.6	3,030.2	2,988.3	3,201.6
Santa Cruz	381.5	399.0	425.3	457.0	475.5	527.6	549.3	531.1	505.2	530.9	573.1
Shasta	224.4	227.4	236.7	243.6	255.4	266.1	289.6	286.8	292.5	305.0	319.7
Sierra	11.4	11.8	12.3	13.0	13.7	14.6	15.5	15.9	16.3	16.5	16.8
Siskiyou	99.9	103.9	109.1	113.3	121.0	124.1	133.1	143.6	147.1	150.7	151.3
Solano	334.9	342.8	361.9	391.8	403.3	438.6	494.6	467.5	455.2	479.7	506.8
Sonoma	703.0	734.3	785.3	842.3	888.8	943.0	1,005.3	986.6	990.4	1,016.7	1,082.8
Stanislaus	252.4	259.9	269.7	279.1	282.9	305.0	341.2	339.3	339.8	358.7	376.0
Sutter	44.7	45.4	48.0	49.5	49.6	53.3	59.3	58.2	58.9	60.6	63.5
Tehama	68.0	69.6	73.7	76.3	80.7	83.3	89.3	92.3	93.5	96.1	101.7
Trinity	32.5	33.4	35.0	36.0	38.9	39.5	41.1	43.2	44.0	45.2	46.8
Tulare	204.8	209.2	218.1	230.9	240.3	250.8	271.2	274.5	284.0	295.2	316.6
Tuolumne	107.1	106.3	109.9	118.2	122.9	130.5	136.1	138.2	140.4	143.9	148.0
Ventura	736.3	752.6	802.5	851.5	891.4	970.3	1,071.2	1,028.0	1,024.7	1,047.7	1,113.1
Yolo	138.0	141.0	148.7	157.4	163.5	178.4	198.0	192.6	189.6	203.3	218.5
Yuba	40.4	44.2	47.6	48.3	47.7	51.3	57.0	57.1	57.0	60.9	71.2
California	53,957.7	55,432.9	60,201.5	65,478.1	67,775.8	72,192.8	78,001.1	74,653.6	73,967.7	76,782.0	81,876.3

Source: Dean Runyon Associates, inc. 2006

California's Top Attractions

Top California Theme Parks (Based on 2005 attendance)

Disneyland, Anaheim	14,550,000
Disney's California Adventure	5,830,000
Universal Studios Hollywood TM	4,700,000
SeaWorld, San Diego	4,100,000
Knott's Berry Farm, Buena Park	3,470,000
San Diego Zoo	3,100,000
Santa Cruz Beach Boardwalk, Santa Cruz	3,000,000
Six Flags Magic Mountain, Valencia	2,835,000
Paramount's Great America, Santa Clara	2,070,000
Monterey Bay Aquarium, Monterey	1,884,000
Six Flags Marine World, Vallejo	1,537,000
Legoland, Carlsbad	1,430,000
San Diego Zoo's Wild Animal Park	1,400,000

Sources: *Amusement Business* (Year-End Issue, 2006), Monterey Bay Aquarium, San Diego Zoo and Wild Animal Park

Top Ten National Park Facilities (Based on 2005 visitation)

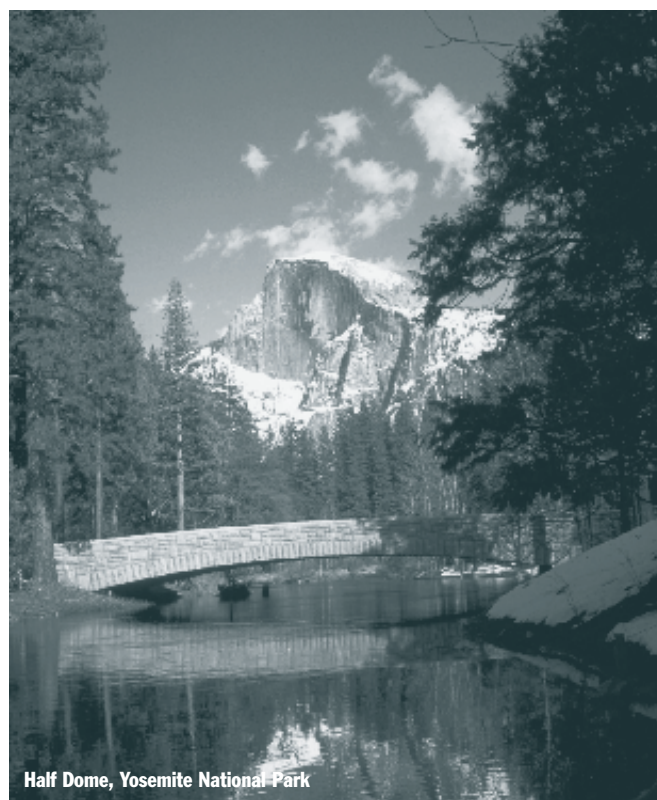
Golden Gate National Recreation Area	13,602,629
San Francisco Maritime Museum	3,976,056
Yosemite National Park	3,304,144
Point Reyes National Seashore	1,988,585
Fort Point National Historic Site	1,682,041
Joshua Tree National Park	1,375,111
Sequoia National Park	1,004,843
Cabrillo National Monument	826,615
Death Valley National Park	800,113
Whiskeytown-Shasta-Trinity National Recreation Area	740,275

Source: National Park Service, 2006

Top Ten State Parks (Based on 2004/2005 fiscal year visitation)

Old Town San Diego State Historic Park	4,578,683
Huntington State Beach	3,062,714
Sonoma Coast State Beach	3,059,141
Seacliff State Beach	2,916,181
Bolsa Chica State Beach	2,695,594
San Onofre State Beach	2,551,463
Doheny State Beach	1,984,200
Oceano Dunes State Vehicle Recreation Area	1,871,162
New Brighton State Beach	1,674,889
Malibu Lagoon State Beach	1,546,979

Source: California State Parks, 2004-2005



Half Dome, Yosemite National Park

Robert Holmes/California Tourism

Main Mode of Transportation, 2005 (% of Person-stays)

	All California Travel			California Leisure Travel	
	Total	Business	Leisure	Residents	Non-Residents
Vehicular					
Auto	68	58	71	76	44
Van/Small Truck	12	14	12	12	12
Camper/RV	2	1	2	2	4
Air Travel	10	16	8	3	36
Bus/Train	4	3	2	5	2

Source: D.K. Shifflet & Associates, Ltd., 2006

California Tourism Visitor Inquires vs Website Visitors, 2001-2005

	Visitor Inquiries (Packet Requests) ^a	Web Visitors (Unique visitors) ^b
2001	157,957	1,179,684
2002	125,167	1,039,356
2003	163,946	1,158,089
2004	124,046	1,082,687
2005	145,330	1,268,671

Source: California Tourism, 2006

(a) From 800 #s, mail and online.

(b) Multiple visits by same individual during one month only counted once.

Trends in Tourism

- Major factors influencing travel in 2005 and expected to carry over to 2006 and beyond:
 - Gas prices remain high.
 - Rise in fuel costs, no frills left to cut, less competitive marketplace means fewer air fare bargains in 2006, tickets to cost more. Domestic airfares expected to increase 5% to 8% next year.¹
 - Room rates and revenues increase, buoyed by return to pre-2001 levels of travel demand, little corresponding increase in room supply.
 - Winter 05-06 consumer sentiment anticipates that economic growth will slow due to the combination of high oil prices and higher interest rates.²
 - Euro and yen exchange rates expected to remain strong against the dollar.
 - Travel disruption due to avian flu preventative measures remains a real threat, whether or not outbreaks affect large populations.
- Highlights of the Annual Travel Forecast by the Travel Industry Association of America:³
 - Modest growth forecast for 2006.
 - "Leisure travel volume is forecasted to increase just 2 % in 2006, compared to 4% for 2005, while international travel to the U.S. will rise 5.5 %. Compared to 2005, the growth in travel spending by domestic and international visitors will increase a more modest 4.4 percent in 2006 to \$674 billion."
 - "Domestic business travel is likely to be constrained [...] due to weak CEO confidence, much slower growth in corporate profits and rising travel costs. TIA is forecasting a 1 % increase in business travel volume for 2005 and a 1.6 % increase for 2006. On a more positive note, a number of experts at TIA's recent Marketing Outlook Forum were rather optimistic about the outlook for meetings and group business travel."
- According to forecasts prepared for the California Travel and Tourism Commission, 2006 U.S. leisure travel will show gains of 1.5% and 3.0 % during Summer and Fall, respectively, while California's Summer leisure is expected to be flat, rising 5.5% over 2005 levels during Fall. California business travel is forecast at 3.0% and 2.7% above 2005 during Spring and Summer, then dropping to 5.0% below the prior year in the September-November period. Overnight stays by non-residents were expected to be up 3.8 % during the summer but flat compared to 2005 in the Fall.⁴
- Stimulated awareness and interest in California will temper these trends, thanks to a national cable television campaign made possible by the \$7.3 million in state funding restored to California Tourism for tourism marketing, to debut in March 2006. Another positive measure to keep California top-of-mind in core out-of-state markets is the expanded partnership California Tourism has established with Southwest Airlines.
- For the 12 months ending December 31, 2005, California lodging occupancies averaged 69 percent statewide, 3.8 % over 2004 and 9.4% above the US average. Revenue per available room averaged \$70.65, an increase of 10.1 % over 2004, while California's lodging inventory grew by less than one percent.⁵
- The number of overseas and Mexican air travelers entering the US through California ports of entry, though not necessarily

traveling within the state, increased 5.8% in 2005. China, France, Mexico, Hong Kong, Australia and New Zealand showed the greatest gains of California's top markets.⁶

- Foreign visitors spent more than ever in the U.S. last year despite their numbers continuing to be held down partly by the war on terror. Government figures show people from other countries spent a record \$104.8 billion on lodging, meals, entertainment and other travel expenses, up 12% from 2004. The number of foreign visitors – 49.4 million – was up 7% from 2004, according to the U.S. Commerce Department. The number of foreign visitors continues to lag behind the recent peak of 51.2 million in 2000.⁷
- Although Japanese travelers may never return to California in the same numbers as in the early nineties, the outlook for the next few years is much improved, with growth expected in interest and demand for travel to the US mainland. A record-breaking 18 million Japanese will take international trips in 2006 according to Japan Travel Bureau. This is due to continued economic growth, improved corporate profits, increased disposable income. Travel by seniors is expected to take over young people in 2006-07.⁸
- Developments with China continue to confirm the inevitability that it will come to rank among California's most important markets. With 31 million in outbound tourism in 2005 and an expected 100 million predicted by 2020, China has huge revenue potential for the entire U.S. In March 2006 China and the US signed aviation agreements to promote bilateral travel and tourism cooperation that will increase two-way flights between the two countries by 460 percent. Under the 2006 agreement the current 54 flights a week will rise to 249 flights over the next six years, and airlines permitted to run services between the US and China increase from four to nine.

¹Amex Business Travel 2006 Global Business Forecast, 10/31/05.

²University of Michigan, Index of Consumer Sentiment, February 2006

³TIA Outlook Forum, 11/8/05

⁴D.K. Shifflet & Associates Ltd., California 2006 Topline Projections

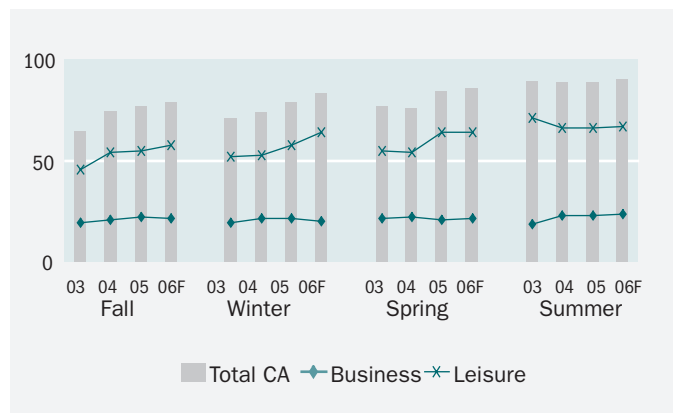
⁵Smith Travel Research, February 2006.

⁶CIC Research Inc., February 2006.

⁷USA Today, 2/16/2006

⁸Japan Market Update, Ko Ueno, January 2006

California Domestic Travel by Season 2003-2006 (Millions of Domestic Person-stays)



Source: D.K. Shifflet & Associates, Ltd., 2006

Regional Information



North Coast

The North Coast changes moods with the weather. From sunny vineyards to misty forests to the foggy coast, it is a place out of the past yet bursting with the future. The North Coast region retains a mix of pastoral and wilderness character that once epitomized much of the state. The region includes the counties of Sonoma, Mendocino, Lake, Humboldt, and Del Norte.

Two California Welcome Centers are located in the North Coast region, at Santa Rosa and Arcata.



Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Sonoma	7.0 million	1.1 million	5.9 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Profile

	CA Leisure Travel to Humboldt County (Avg. 1999-2001)	CA Leisure Travel to Mendocino County (Avg. 1999-2001)	CA Leisure Travel to Sonoma County (Avg. 2003-2004)
Non-CA resident travelers	N/A	N/A	6%
Avg. length of stay (all trips)	2.0 nights	1.1 nights	1.86 days
Avg. length of overnight stay	2.7 nights	2.6 nights	3.2 days
Avg. party size	3.6 persons	2.9 persons	2.22 persons
% Traveling with children	33%	22%	16%
% Day trips	19%	48%	55%
Mean household income	\$55,000	\$82,800	\$79,862
Used rental car	8%	7%	5%
Hotel/motel stay	N/A	N/A	30%

Source: D.K. Shifflet & Associates, Ltd., 2002, 2006

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
Sonoma County	\$74.70	\$74.70	121.60

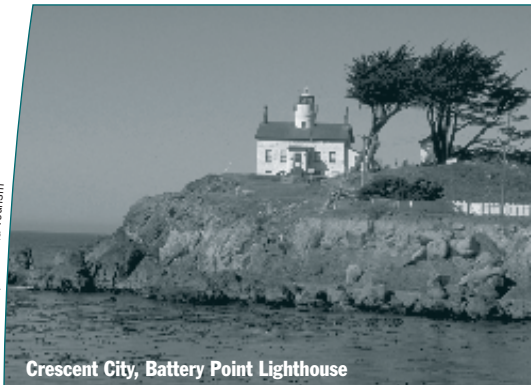
Source: D.K. Shifflet & Associates, Ltd., 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
California North	61.8%	0.7%	\$82.61	5.1%	620	32,864
California North Area	60.2%	-0.5%	\$68.49	6.0%	264	11,169
Eureka/Crescent City	60.7%	1.7%	66.48	2.3%	69	3,028
Santa Rosa-Petaluma	62.2%	5.4%	\$109.08	10.3%	82	5,584

Source: Smith Travel Research, 2006

Robert Holmes/California Tourism



Crescent City, Battery Point Lighthouse

Population of Cities (2005)

- Eureka26,381
- Crescent City7,666
- Santa Rosa156,268

National Park

- **Redwood National Park**
2005 Attendance 394,144

State Parks

- **Jedediah Smith State Park**
Attendance 85,887*
- **Del Norte Coast Redwoods State Park**
Attendance 95,961*
- **Prairie Creek Redwoods State Park**
Attendance 164,454*
- **Grizzly Creek State Park**
Attendance 25,458*
- **Humboldt Redwoods State Park**
Attendance 441,824*
- **Sonoma Coast State Beach**
Attendance 3,059,141*

*2004/2005 fiscal year

Shasta Cascade

The Shasta Cascade is an outdoor recreation wonderland. Volcanic landscapes and dense forests provide a scenic venue for camping, hiking, biking, hunting, fishing, swimming, boating, water-skiing, snow shoeing, downhill and cross-country skiing, birding and wildlife viewing. The region includes Siskiyou, Modoc, Trinity, Shasta, Lassen, Tehama, Plumas and Butte Counties.

The California Welcome Center, Anderson is located adjacent to Interstate 5.



Mt. Shasta

Robert Holmes/California Tourism

Population of Cities (2005)

- Redding 88,459
- Yreka 7,383
- Oroville 13,369

National Parks

- Whiskeytown-Shasta-Trinity National Recreation Area
2005 attendance 740,275
- Lassen Volcanic National Park
2005 attendance 365,535
- Lava Beds National Monument
2005 attendance 107,475

State Parks

- Castle Crags State Park
Attendance 36,128*
- Plumas-Eureka State Park
Attendance 32,810*
- McArthur-Burney Falls State Park
Attendance 168,311*
- Lake Oroville State Recreation Area
Attendance 1,364,348*

*2004/2005 fiscal year

Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Shasta	2.5 million	0.5 million	2.0 million
Butte	2.1 million	0.3 million	1.8 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Profile

	CA Leisure Travel to Shasta County/Redding MSA (Avg. 2000-2004)	CA Leisure Travel to Butte County/Chico MSA (Avg. 2000-2004)
Non-CA resident travelers	18%	7%
Avg. length of stay (all trips)	1.86 days	2.25 days
Avg. length of overnight stay	2.85 days	3.6 days
Avg. party size	2.24 persons	2.46
% Traveling with children	31%	37%
% Day trips	47%	47%
Mean household income	\$63,430	\$58,290
Used rental car	4%	2%
Hotel/motel stay	39%	30%

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Spending (Average expenditures per person per day, less transportation)

	Total	Leisure Travel
Shasta County (Avg. 2000-2004)	\$76.59	\$73.11
Butte County (Avg. 2000-2004)	\$70.66	\$62.64

Source: D.K. Shifflet & Associates, Ltd., 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
California North	61.8%	0.7%	\$82.61	5.1%	620	32,864
Redding/Chico	63.8%	1.8%	\$64.42	2.2%	68	4,415

Source: Smith Travel Research, 2006

San Francisco Bay Area

The San Francisco Bay Area is a feast for the senses. The dramatic landscape, the fog and sun climate and the multicultural medley of the diverse neighborhoods all contribute to make a uniquely California blend. The region encompasses the counties of San Francisco, San Mateo, Santa Cruz, Alameda, Marin, and Napa; northern Santa Clara County, and western Contra Costa and Solano counties.

A California Welcome Center is located at PIER 39 in San Francisco.



Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
San Francisco/San Mateo/Marin	30.0 million	9.0 million	21.0 million
Alameda/Contra Costa	12.7 million	5.2 million	7.5 million
Santa Cruz	5.5 million	0.6 million	4.9 million
Napa	3.5 million	0.3 million	3.1 million
Santa Clara/San Benito	13.0 million	5.5 million	7.5 million
Solano	5.3 million	1.0 million	4.3 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Profile

	CA Leisure Travel to San Francisco San Mateo/Marin MSA (2004)	CA Leisure Travel to Alameda County (Avg. 2003-2004)	CA Leisure Travel to San Jose Santa Clara (Avg. 2003-2004)	CA Leisure Travel to Napa County (Avg. 2001-2004)
Non-CA resident travelers	20%	13%	15%	8%
Avg. length of stay (all trips)	2.2days	2.23 days	2.4 days	1.86 days
Avg. length of overnight stay	3.85 days	4.09 days	3.78 days	3.67 days
Avg. party size	2.15 persons	2.2 persons	2.31 persons	2.21 persons
% Traveling with children	20%	33%	26%	11%
% Day trips	53%	56%	45%	62%
Mean household income	\$85,886	\$77,781	\$76,836	\$77,732
Used rental car	14 %	6%	6%	7%
Hotel/motel stay	51%	37%	37%	46%

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
San Francisco	\$129.30	\$120.30	\$115.40
Alameda	\$70.80	\$70.20	\$55.00
Santa Clara	\$79.30	\$63.90	\$49.00
Santa Cruz	\$70.10	\$70.40	\$56.00
Contra Costa	\$60.30	\$53.10	\$45.60
Solano	\$86.80	\$91.90	\$98.70

Source: D.K. Shifflet & Associates, Ltd., 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
Oakland	61.8%	6.2%	\$85.38	2.6%	240	24,251
San Francisco/San Mateo	71.5%	5.1%	\$124.88	5.7%	399	50,674
San Jose-Santa Cruz	62.4%	7.4%	\$100.91	4.4%	313	29,692
Vallejo-Fairfield-Napa	62.9%	-1.7%	\$97.71	2.5%	137	8,668

Source: Smith Travel Research, 2006

Robert Holmes/California Tourism



Population of Cities (2005)

- San Francisco . . 799,263
- Oakland 412,318
- Santa Cruz 56,451
- Napa 76,346

Theme Parks

- Santa Cruz Beach Boardwalk
2005 attendance 3,000,000
- Six Flags Marine World
2005 attendance 1,537,000
- Paramount's Great America
2005 attendance 2,070,000

National Parks

- Golden Gate National Recreation Area, 2005 attendance 13,602,629
- San Francisco Maritime Museum
2005 attendance 3,976,056
- Point Reyes National Seashore
2005 attendance 1,988,585
- Fort Point National Historical Site
2005 attendance 1,682,041
- Muir Woods National Monument
2005 attendance 775,941

State Parks

- Mount Tamalpais State Park Attendance 411,906*
- Seacliff State Beach
Attendance 2,916,181*

*2004/2005 fiscal year

Central Valley

Bound by the gently rolling hills of the Coast Range to the west and the Sierra foothills to the east, the Central Valley's fertile land provides 25% of the country's table food. The inland fingers of the Delta, and the many rivers, lakes and reservoirs of the valley offer numerous water recreation opportunities. The region includes Glenn, Colusa, Yolo, Yuba, Sutter, San Joaquin, Stanislaus, Merced, and Kings counties; the northwestern portion of Kern County; western portions of Tulare, Madera, and Fresno counties, the northeastern portion of Solano County, and the eastern portion of Contra Costa County.

The California Welcome Center, Merced is a convenient stop for travelers in the Central Valley.



Stanislaus River, rafting

Robert Holmes/California Tourism

Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Kern	7.8 million	3.6 million	4.2 million
Fresno	6.6 million	2.3 million	4.3 million
San Joaquin	4.0 million	0.7 million	3.3 million
Merced	3.4 million	0.5 million	2.9 million
Stanislaus	3.5 million	1.5 million	2.0 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
Fresno	\$61.60	\$54.10	\$43.50
Kern	\$65.90	\$68.50	\$88.00

Source: D.K. Shifflet & Associates, Ltd., 2006

Population of Cities (2005)

- **Fresno** 464,727
- **Bakersfield** 295,893
- **Stockton** 279,513
- **Modesto** 207,634

State Parks

- **Brannan Island State Recreation Area**
Attendance 107,616*
- **San Luis Reservoir State Recreation Area**
Attendance 441,636*
- **Millerton Lake State Recreation Area**
Attendance 418,256*
- **Fort Tejon State Historic Park**
Attendance 39,083*

*2004/2005 fiscal year

Domestic Visitor Profile

	CA Leisure Travel to Fresno County (Avg. 2002-2004)	CA Leisure Travel to Merced (Avg. 2002-2004)	CA Leisure Travel to San Joaquin County (Avg. 2001-2004)	CA Leisure Travel to Kern County (Avg. 2002-2004)
Non-CA resident travelers	5%	7%	9%	9%
Avg. length of stay (all trips)	1.94 days	2.07 days	1.72 days	1.81 days
Avg. length of overnight stay	2.95 days	3.32 days	3.03 days	2.80 days
Avg. party size	2.17 persons	2.5 persons	2.16 persons	2.33 persons
% traveling with children	34%	29%	28%	26%
% Day trips	46%	49%	58%	48%
Mean household income	\$64,240	\$68,201	\$67,933	\$57,186
Used rental car	2%	4%	3%	3%
Hotel/motel stay	42%	43%	42%	39%

Source: D.K. Shifflet & Associates, Ltd., 2006

Lodging Statistics

	Avg. Occupancy Rate 2004	Percent change 2004:2005	Avg. Room Rate 2004	Percent change 2004:2005	Hotel Census	Room Census
Bakersfield	63.8%	3.7%	\$59.16	5.8%	115	8,777
Fresno	63.2%	-0.5%	\$66.62	5.8%	114	8,793
Tulare/Visalia	65.0%	4.7%	\$65.01	3.4%	85	4,895
Stockton	65.0%	2.5%	\$65.28	3.8%	101	6,760
Vallejo-Fairfield-Napa	62.9%	-1.7%	\$97.71	2.5%	137	8,668

Source: Smith Travel Research, 2006

Gold Country

The discovery of gold in the American River at Coloma in 1848 identified California as the land of golden opportunity. Today, the region is a blend of contemporary culture and pioneer beginnings. The Gold Country region includes all of Sacramento and Sierra counties, western portions of Nevada, Placer, El Dorado, Amador, Calaveras and Tuolumne counties, and eastern Madera County.

The California Welcome Center, Auburn is located adjacent to Interstate Highway 80.



Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Sacramento/El Dorado/Placer/Yolo	27.7 million	8.2 million	19.6 million
Madera	1.1 million	0.1 million	1.1 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
Sacramento	\$69.40	\$62.30	\$55.60
El Dorado	\$69.50	\$60.40	\$77.70

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Profile

	CA Leisure Travel to Sacramento /Placer/El Dorado Yolo Counties (2004)
Non-CA resident travelers	13%
Avg. length of stay (all trips)	2.2 days
Avg. length of overnight stay	3.76 days
Avg. party size	2.35 persons
% Traveling with children	25%
% Day trips	52%
Mean household income	\$74,666
Used rental car	4%
Hotel/motel stay	30%

Source: D.K. Shifflet & Associates, Ltd., 2006

Air Arrivals, SMF, 2005

Domestic	Percent change 2004:2005
5,044,547	6.0%
International	Percent change 2004:2005
54,115	121.7%

Source: County of Sacramento, County Airport System, March 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
California North Central	63.4%	4.4%	\$81.99	11.6%	264	16,326
Sacramento	63.4%	1.0%	\$88.34	2.2%	278	22,440

Source: Smith Travel Research, 2006



John Poirineo/California Tourism

Population of Cities (2005)

- **Sacramento** 452,959
- **Auburn** 12,849
- **Placerville** 10,350

State Parks

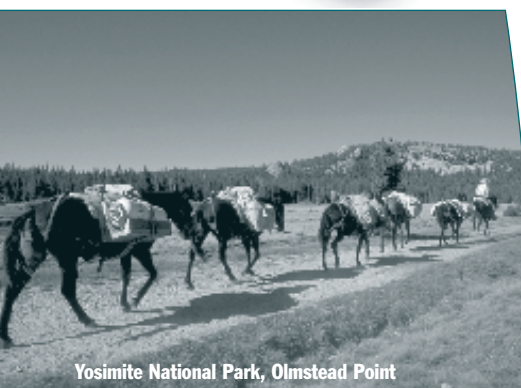
- **Folsom Lake State Recreation Area**
Attendance 878,000*
- **Old Sacramento State Historic Park**
Attendance 406,261*
- **Marshall Gold Discovery State Historic Park**
Attendance 447,929*
- **Columbia State Historic Park**
Attendance 450,687*
- **Empire Mine State Historic Park**
Attendance 109,742*

*2004/2005 fiscal year

High Sierra



The High Sierra is symbolic of the American wilderness. The crystal-clear high country lakes, steaming hot springs, giant sequoias and peaks of the Sierra Nevada are an outdoor enthusiast's dream. The High Sierra region includes all of Alpine, Mariposa and Mono counties, the eastern portions of Nevada, Placer, El Dorado, Amador, Calaveras, Tuolumne, Madera, Fresno and Tulare counties, the northern portion of Inyo County, and northeastern Kern County.



Yosemite National Park, Olmstead Point

Robert Holmes/California Tourism

Population of Cities (2005)

- Truckee 15,657
- S. Lake Tahoe 24,059
- Bishop 3,643

National Parks

- **Yosemite National Park**
2005 attendance 3,304,144
- **Sequoia National Park**
2005 attendance 1,004,843
- **Kings Canyon National Park**
2005 attendance 594,893
- **Devil's Postpile National Monument**
2005 attendance 67,402
- **Manzanar National Historical Site**
2005 attendance 78,172

State Parks

- **Donner Memorial State Park**
Attendance 159,322*
- **Calaveras Big Trees State Park**
Attendance 171,644*
- **D.L. Bliss State Park**
Attendance 64,262*
- **Emerald Bay State Park**
Attendance 364,662*
- **Sugar Pine Point State Park**
Attendance 80,144*

*2004/2005 fiscal year

Domestic Visitor Spending, 2005

(Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
El Dorado	\$69.50	\$60.40	\$77.00
Fresno	\$61.60	\$54.10	\$43.50

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Profile

	CA Leisure Travel to Sacramento/Placer El Dorado/Yolo Counties (2004)	CA Leisure Travel to Fresno County (Avg. 2002-2004)	CA Leisure Travel to Tulare County (Avg. 2000-2004)
Non-CA resident travelers	13%	5%	9%
Avg. length of stay (all trips)	2.2 days	1.94 days	2.30 days
Avg. length of overnight stay	3.76 days	2.95 days	3.56 days
Avg. party size	2.35 persons	2.17 persons	2.35 persons
% Traveling with children	25%	34%	30%
% Day trips	52%	46%	45%
Mean household income	\$74,666	\$64,240	\$62,274
Used rental car	4%	2%	5%
Hotel/motel stay	30%	42%	32%

Source: D.K. Shifflet & Associates, Ltd., 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
California North Central	63.4%	4.4%	\$81.99	11.6%	264	16,326
Fresno	63.2%	-0.5%	\$66.62	5.8%	114	8,793
Tulare/Visalia	65.0%	4.7%	\$65.01	3.4%	85	4,895

Source: Smith Travel Research, 2006

Central Coast

The Central Coast is serene Missions, bucolic agricultural communities, and the dramatic meeting of ocean and land. Sometimes called the Middle Kingdom, the region is located between the San Francisco Bay Area and Southern California. It includes Ventura, Santa Barbara, San Luis Obispo, Monterey and San Benito counties, and the southern portion of Santa Clara County.

Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Monterey	8.8 million	1.7 million	7.4 million
Santa Barbara	11.1 million	3.9 million	7.2 million
San Luis Obispo	8.6 million	2.5 million	6.1 million
Ventura	3.8 million	0.4 million	3.4 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
Monterey	\$98.50	\$97.90	\$97.00
San Luis Obispo	\$83.80	\$86.70	\$62.60
Santa Barbara	\$89.90	\$95.20	\$76.60

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Profile

	CA Leisure Travel to Monterey County (Avg. 2003-2004)	CA Leisure Travel to San Luis Obispo County (Avg. 2003-2004)	CA Leisure Travel to Santa Barbara County (Avg. 2003-2004)	CA Leisure Travel to Ventura County (Avg. 2001-2004)
Non-CA resident travelers	8%	6%	6%	7%
Avg. length of stay (all trips)	1.91 days	2.29 days	1.85 days	1.83 days
Avg. length of overnight stay	3.05 days	3.05 days	3.22 days	3.13 days
Avg. party size	2.49 persons	2.49	2.16 persons	2.08 persons
% Traveling with children	32%	29%	17%	25%
% Day trips	50%	33%	55%	54%
Mean household income	\$98,625	\$65,337	\$84,634	\$72,460
Used rental car	5%	6%	6%	7%
Hotel/motel stay	63%	55%	55%	26%

Source: D.K. Shifflet & Associates, Ltd., 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
Central Coast	65.7%	0.8%	\$118.95	6.2%	550	35,240
Monterey/Salinas	62.6%	-0.3%	\$153.33	6.7%	205	11,552
Santa Barbara/Santa Maris	70.4%	2.6%	\$118.65	7.5%	123	8,770
SLO/Paso Robles	63.7%	0.8%	\$98.99	5.3%	143	7,594
Oxnard/Ventura	67.2%	0.1%	\$87.08	6.2%	79	7,324

Source: Smith Travel Research, 2006



Robert Holmes/California Tourism



Pismo Beach Dunes State Vehicle Recreation Area

Population of Cities (2005)

- Monterey 30,641
- San Luis Obispo . . 44,519
- Santa Barbara . . . 90,518
- Oxnard 188,849

Theme Park

- Monterey Bay Aquarium
2005 attendance 1,884,000

National Park

- Channel Islands National Park
2005 attendance 434,107

State Parks

- Salinas River State Beach
Attendance 352,587*
- Monterey State Historic Park
Attendance 409,870*
- Hearst Castle™
Attendance 690,860*
- Pfeiffer Big Sur State Park
Attendance 257,327*

*2004/2005 fiscal year

Los Angeles County

Movie making and the glamour of the Silver Screen fascinate the world, but Los Angeles County is much more. The region encompasses high desert, chaparral covered hillsides, sparkling beaches, snowy peaks and a sprawling metropolis, all in one county.



Robert Holmes/California Tourism

Catalina Island, Avalon Casino

Population of Cities (2005)

- Los Angeles . . . 3,957,875
- Long Beach 491,564
- Glendale 207,000
- Beverly Hills 35,969

Theme/Amusement Parks

- Universal Studios, Hollywood™
2005 attendance 4,700,000
- Six Flags Magic Mountain
2005 attendance 2,835,000

National Park

- Santa Monica Mountains
National Recreation Area
2005 attendance 447,190

State Parks

- Topanga State Park
Attendance 582,572*

*2004/2005 fiscal year

Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Los Angeles	53.7 million	16.5 million	37.2 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
Los Angeles	\$95.50	\$84.90	\$94.30

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Profile

	CA Leisure Travel to Los Angeles County (2004)
Non-California resident traveler	19%
Avg. length of stay (all trips)	2.17 days
Avg. length of overnight stay	3.98 days
Avg. party size	2.25
% Traveling with children	27%
% Day trips	56%
Mean household income	\$73,604
Used rental car	11%
Hotel/motel stay	49%

Source: D.K. Shifflet & Associates, Ltd., 2002

Air Arrivals, LAX, 2005

Domestic	Percent change 2004:2005
21,997,335	-0.1%
International	Percent change 2004:2005
8,842,739	6.3%

Source: City of Los Angeles Department of Airports

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
Los Angeles-Long Beach	74.6%	4.0%	\$103.95	7.2%	979	95,753

Source: Smith Travel Research, 2005

Orange County

Walt Disney opened Disneyland in 1955 and pastoral Orange County was changed forever. The economic boom that followed brought luxury resorts, professional sports, shopping centers and recreation opportunities of all types.

The California Welcome Center in Santa Ana serves the millions of visitors to the region.



Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Orange	31.2 million	5.1 million	26.1 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
Orange	\$103.50	\$98.60	\$96.70

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Profile

	CA Leisure Travel to Orange County (2004)
Non-California resident travelers	17%
Avg. length of stay (all trips)	2.01 days
Avg. length of overnight stay	3.57 days
Avg. party size	2.66 persons
% Traveling with children	42%
% Day trips	55%
Mean household income	\$72,383
Used rental car	5%
Hotel/motel stay	77%

Source: D.K. Shifflet & Associates, Ltd., 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
Anaheim-Santa Ana	74.3%	6.9%	\$102.28	7.4%	426	52,040

Source: Smith Travel Research, 2006

Robert Holmes/California Tourism



Newport Beach, marina

Population of Cities (2005)

- **Anaheim** 345,317
- **Santa Ana** 351,697
- **Costa Mesa** 113,440

Theme/Amusement Parks

- **Disneyland**
2005 attendance 14,550,000
- **Disney's California Adventure**
2005 attendance 5,830,000
- **Knott's Berry Farm**
2005 attendance 3,470,000

State Parks

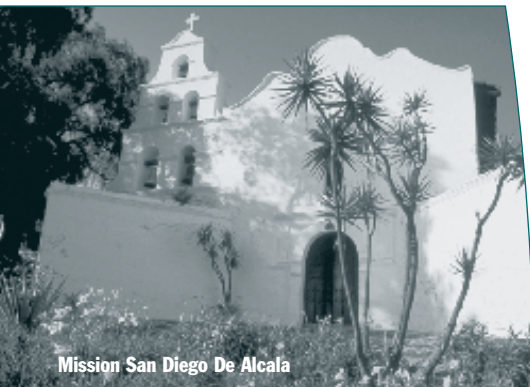
- **Bolsa Chica State Beach**
Attendance 2,695,594*
- **Huntington State Beach**
Attendance 3,062,714*
- **Crystal Cove State Park**
Attendance 464,933*
- **Doheny State Beach**
Attendance 1,984,200*
- **San Clemente State Beach**
Attendance 734,456*

*2004/2005 fiscal year

San Diego County

San Diego reflects the blend of cultures and geography that evolved into the California of today. The Mission, the beaches, the city, the valley and the nearby mountains treat visitors to a glimpse of the old, the new, and the beautiful. A short drive takes you from the beach to wooded mountains where snow dusts the peaks in the winter. All of San Diego County except for Borrego Springs and Anza-Borrego Desert State Park is included in the San Diego County region.

The California Welcome Center, Oceanside is conveniently located on the Coast Highway.



Robert Holmes/California Tourism

Population of Cities (2005)

- **San Diego** 1,305,736
- **Carlsbad** 95,146
- **Oceanside** 175,085

Theme/Amusement Parks

- **SeaWorld**
2005 attendance 4,100,000
- **San Diego Zoo**
2005 attendance 3,100,000
- **Wild Animal Park**
2005 attendance 1,400,000
- **LEGOLAND**
2005 attendance 1,430,000

National Park

- **Cabrillo National Monument**
2005 attendance 826,615

State Parks

- **Old Town San Diego State Historic Park**
Attendance 4,578,683*
- **San Onofre State Beach**
Attendance 2,551,463*
- **Carlsbad State Beach**
Attendance 1,522,645*
- **Cardiff State Beach**
Attendance 1,225,631*
- **Silver Strand State Beach**
Attendance 407,258*

*2004/2005 fiscal year

Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
San Diego	44.7 million	12.1 million	32.7 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
San Diego	\$91.70	\$90.70	\$87.70

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Profile

	CA Leisure Travel to San Diego County (2004)
Non-California resident travelers	19%
Avg. length of stay (all trips)	2.41 days
Avg. length of overnight stay	4.16 days
Avg. party size	2.73
% Traveling with children	39%
% Day trips	51%
Mean household income	\$74,518
Used rental car	10%
Hotel/motel stay	46%

Source: D.K. Shifflet & Associates, Ltd., 2006

Air Arrivals, SAN, 2005

Domestic	Percent change 2004:2005
8,524,534	5.3%
International	Percent change 2004:2005
155,293	97.4%

Source: San Diego Unified Port District Airport Operations Department, 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
San Diego	72.3%	2.0%	\$122.00	7.0%	448	53,598

Source: Smith Travel Research, 2006

Deserts and Inland Empire

California's deserts are full of contrasts. Side by side with golf courses, tennis courts and luxury resorts are colorful geological formations, fan-palm oases, riparian wetlands, spring wildflowers, high rugged peaks and an inland saltwater sea. The Desert region includes all of Imperial County, and the eastern portions of San Bernardino, Riverside, San Diego, Kern and Inyo counties.

There are two California Welcome Centers in the Desert region. The Barstow facility provides travelers with information as they enter California through the desert. The California Welcome Center in Yucca Valley serves desert visitors to the Palm Springs and Joshua Tree National Park area.

Visitors to the Inland Empire find a world of surprises: nearby ski resorts, lush vineyards, a mission-style inn, orchards, and hot-air balloon festivals. The region encompasses the western portions of Riverside and San Bernardino Counties, including the communities of Riverside, San Bernardino, Temecula, Hemet, Big Bear, Lake Arrowhead, San Jacinto and Victorville.



Domestic Visitor Volume, 2005 (millions of person-stays)

	Total Travel	Business Travel	Leisure Travel
Riverside/San Bernardino	32.4 million	7.0 million	25.4 million

Source: D.K. Shifflet & Associates, Ltd., 2006. See notes, more volumes, on p.20.

Domestic Visitor Spending, 2005 (Average expenditures per person per day, less transportation)

	Total	Leisure Travel	Non-Resident Travel
Riverside	\$97.50	\$99.90	\$87.50
San Bernardino	\$69.00	\$67.90	\$72.50

Source: D.K. Shifflet & Associates, Ltd., 2006

Domestic Visitor Profile

	CA Leisure Travel to Riverside/San Bernardino MSA (2004)
Non-California resident travelers	18%
Avg. length of stay (all trips)	1.99 days
Avg. length of overnight stay	3.58 days
Avg. party size	2.19 persons
% Traveling with children	23%
% Day trips	56%
Mean household income	\$71,487
Used rental car	4%
Hotel/motel stay	33%

Source: D.K. Shifflet & Associates, Ltd., 2006

Air Arrivals, ONT, 2005

Domestic	Percent change 2004:2005
3,542,832	3.9%
International	Percent change 2004:2005
58,718	11.2%

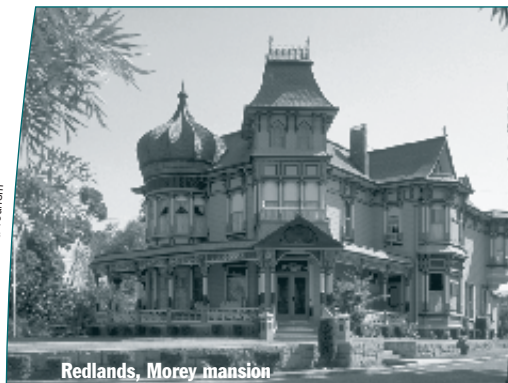
Source: City of Los Angeles Department of Airports, 2006

Lodging Statistics

	Avg. Occupancy Rate 2005	Percent change 2004:2005	Avg. Room Rate 2005	Percent change 2004:2005	Hotel Census	Room Census
Riverside/San Bernardino	66.9%	2.0%	\$88.89	5.3%	476	38,537

Source: Smith Travel Research, 2006

Robert Holmes/California Tourism



Redlands, Morey mansion

Population of Cities (2005)

- Palm Springs¹ . . . 45,731
- Palm Desert¹ 49,280
- Riverside² 285,537
- San Bernardino² . . 199,803
- Ontario² 170,373

National Parks

- Joshua Tree National Park¹
2005 attendance 1,375,111
- Death Valley National Park¹
2005 attendance 800,113

State Parks

- Red Rock Canyon State Park¹
Attendance 31,505*
- Providence Mountains State Park¹
Attendance 14,370*
- Salton Sea State Recreation Area¹
Attendance 278,193*
- Anza-Borrego Desert State Park¹
Attendance 532,948*
- Lake Perris State Recreation Area²
Attendance 1,075,667*
- Silverwood Lake State Recreation Area²
Attendance 265,534*
- Mount San Jacinto State Park²
Attendance 377,214*

*2004/2005 fiscal year

¹ Deserts

² Inland Empire

Domestic Travel to California Destinations, 2004-2005 (Millions of Person-stays)

County (Metropolitan Statistical Area or Division)	Year	Total	Business	Leisure	Residents	Non-Residents	Leisure Residents	Leisure Non-Res.
Alameda/Contra Costa	2004	12.0	4.8	7.2	11.1	0.9	6.7	0.5
(Oakland-Fremont-Hayward, MD)	2005	12.7	5.2	7.5	11.5	1.2	6.4	0.8
Butte	2004	2.1	0.4	1.7	2.0	0.1	1.6	0.1
(Chico, MSA)	2005	2.1	0.3	1.8	2.0	0.1	1.8	0.0
Fresno	2004	5.6	1.9	3.8	5.3	0.3	3.6	0.1
(Fresno, MSA)	2005	6.6	2.3	4.3	6.0	0.6	3.9	0.4
Kern	2004	6.5	2.4	4.1	6.0	0.5	3.8	0.3
(Bakersfield, MSA)	2005	7.8	3.6	4.2	6.8	1.1	3.3	0.9
Los Angeles	2004	53.6	19.2	34.3	42.6	11.0	28.0	6.3
(Los Angeles-Long Beach-Glendale, MD)	2005	53.7	16.5	37.2	39.9	13.8	28.2	8.9
Merced	2004	3.3	0.6	2.7	3.1	0.2	2.5	0.2
(Merced, MSA)	2005	3.4	0.5	2.9	3.2	0.2	2.7	0.2
Monterey	2004	7.9	1.3	6.6	7.3	0.7	6.1	0.5
(Salinas, MSA)	2005	8.8	1.5	7.4	7.5	1.3	6.1	1.2
Napa	2004	3.9	0.3	3.5	3.6	0.3	3.2	0.3
(Napa, MSA)	2005	3.5	0.3	3.1	3.1	0.4	2.9	0.2
Orange	2004	28.2	4.7	23.6	23.4	4.8	19.7	3.9
(Santa Ana/Anaheim-Irvine, MD)	2005	31.2	5.1	26.1	25.5	5.7	21.5	4.6
Riverside-San Bernardino	2004	30.8	6.9	24.0	26.0	4.8	19.7	4.3
(Riverside-San Bernardino-Ontario, MSA)	2005	32.4	7.0	25.4	28.7	3.7	22.5	2.9
Sacramento/Placer/El Dorado/Yolo	2004	24.7	7.4	17.4	21.7	3.0	15.1	2.2
(Sacto-Arden-El Dorado-Yolo-Arcade-Rsvl, MSA)	2005	27.7	8.2	19.6	24.3	3.4	17.5	2.0
San Diego	2004	42.4	11.8	30.6	33.5	8.9	24.8	5.8
(San Diego-Carlsbad-San Marcos, MSA)	2005	44.7	12.1	32.7	32.8	11.9	25.5	7.2
San Francisco/San Mateo/Marin	2004	27.2	8.5	18.7	20.8	6.3	14.9	3.8
(San Francisco-San Mateo-Redwood City, MD)	2005	30.0	9.0	21.0	24.8	5.1	17.6	3.4
San Joaquin	2004	4.2	1.0	3.1	3.5	0.6	2.7	0.4
(Stockton, MSA)	2005	4.0	0.7	3.3	3.4	0.5	2.8	0.5
San Luis Obispo	2004	7.9	2.3	5.6	7.4	0.4	5.2	0.4
(San Luis Obispo-Paso Robles, MSA)	2005	8.6	2.5	6.1	8.2	0.4	5.8	0.3
Santa Barbara	2004	10.0	2.9	7.0	9.4	0.6	6.7	0.3
(Santa Barbara-Santa Maria-Goleta, MSA)	2005	11.1	3.9	7.2	10.7	0.4	6.8	0.4
Santa Clara/San Benito	2004	11.3	3.9	7.4	9.1	2.2	6.2	1.2
(San Jose-Sunnyvale-Santa Clara, MSA)	2005	13.0	5.5	7.5	10.9	2.1	6.2	1.3
Santa Cruz	2004	4.7	0.3	4.3	4.5	0.1	4.2	0.1
(Santa Cruz-Watsonville, MSA)	2005	5.5	0.6	4.9	5.4	0.1	4.8	0.1
Shasta	2004	2.3	0.3	2.0	2.0	0.3	1.6	0.3
(Redding, MSA)	2005	2.5	0.5	2.0	2.0	0.5	1.6	0.4
Solano	2004	5.8	1.0	4.7	5.2	0.5	4.5	0.3
(Vallejo-Fairfield, MSA)	2005	5.3	1.0	4.3	5.0	0.3	4.0	0.3
Sonoma	2004	7.4	1.7	5.7	6.9	0.4	5.5	0.2
(Santa Rosa-Petaluma, MSA)	2005	7.0	1.1	5.9	6.3	0.8	5.4	0.5
Stanislaus	2004	3.3	1.5	1.8	3.2	0.1	1.7	0.1
(Modesto, MSA)	2005	3.5	1.5	2.0	3.3	0.2	1.9	0.1
Tulare	2004	2.3	0.2	2.1	1.8	0.5	1.7	0.4
(Visalia-Porterville, MSA)	2005	2.6	0.5	2.1	1.9	0.7	1.5	0.7
Ventura	2004	3.5	0.3	3.2	3.0	0.4	2.7	0.4
(Oxnard-Thousand Oaks-Ventura, MSA)	2005	3.8	0.4	3.4	3.3	0.5	3.0	0.4

Note: Effective with the release of 2005 data, the title for the measurement previously known as Person-Trips" has been renamed "Person-Stays." This is a title change only and has no effect on past or current data.

The estimates of traveler volume for each California census region, as defined by the December 2003 U.S. Census definitions of Core Based Statistical Areas, were developed by California Tourism. Calculations were based on total California state volume estimates and share of travel to each region listed below as provided in the D.K. Shifflet Associates, Ltd, 2005 California Domestic Travel Report. Not all counties are represented and some counties are combined. See the complete report for the Survey Methodology, notes, sample sizes and confidence intervals. Because of small sample sizes, year to year differences should be interpreted with caution because they may not reflect actual differences in travel volumes, especially in the smaller counties.

Source: D.K. Shifflet & Associates Ltd., 2006; California Tourism, 2006

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Overseas and Mexican Visitors to California, 2005, CIC Research, August 2006

International Arrivals at California Ports of Entry, CIC Research, Inc. 2006

California Domestic Travel Report, 2005, D.K. Shifflet & Associates, August 2006; California MSA Traveler Profiles, 2004, D.K. Shifflet & Associates, January 2006

Monterey Bay Aquarium, March 2006

National Park Service, February 2006

Smith Travel Research, February 2006

Sources of Travel and Tourism Statistics*

Type of Data	Source
CALIFORNIA STATISTICS	
Domestic travel to California; Overseas travel to California; Travel impacts by county; International arrivals at California Ports of entry	California Tourism www.visitcalifornia.com (916) 327-3391; FAX (916) 322-3402
Air Passenger Volume San Francisco	San Francisco International Airport www.sfoairport.com/about/stat/as_min_ats.asp ; (650) 876-2422
Oakland	Metropolitan Oakland International Airport; (510) 577-4152
Los Angeles	Los Angeles World Airports; www.lawa.org
San Diego	San Diego Airport Operations; www.san.org/airport/facts_and_fun/traffic_reports.asp
Sacramento	Sacramento International Airport; www.sacairports.org/int/about/public_relations/index.shtml
Outdoor Recreation National park visitation	National Park Service - Statistics; www.2.nature.nps.gov/mpur/index.cfm
State park visitation	California Department of Parks and Recreation; www.parks.ca.gov
Various studies on recreational visits to US Forests	USDA Forest Service; www.fs.fed.us
Private theme parks and attractions	International Association of Amusement Parks and Attractions; www.iaapa.com Amusement Business; amusementbusiness.com
Hotel Occupancy Northern or Southern California	"Trends" PKF Consulting - San Francisco or Los Angeles. Order monthly, quarterly or annual reports on-line. www.pkfonline.com
California – by metropolitan areas	Smith Travel Research – order publications on-line; www.str-online.com ; (615) 824-8664
Transient occupancy tax receipts (by city collecting)	Dean Runyan Associates, Inc. www.deanrunyan.com – click on Travel Data, then California (503) 226-2973
US STATISTICS	
Trip and traveler characteristics of US resident travel to and through the US.	Directions/Destination/Index; D.K. Shifflet & Associates Ltd. www.dksa.com ; (703) 536-0500
US travel trends; US travel expenditures, job impacts; State travel budgets, etc.	Travel Industry Association of America www.tia.org ; (202) 408-8422
Air passenger origins	Air Transport Association; www.airlines.org
INTERNATIONAL TRAVEL STATISTICS	
Various studies on travel to and from Pacific area destinations (Japan, Thailand, India, etc.)	Pacific Asian Travel Association; www.pata.org
Canadian travel	Statistics Canada; www.statcan.com
Inbound travel to the U.S. Outbound travel from the U.S. to other countries	International Trade Administration, Office of Travel & Tourism Industries; www.tinet.ita.doc.gov Custom studies: CIC Research Inc.; www.cicaresearch.com ; (858) 637-4000
World travel trends	World Travel and Tourism Council; www.wttc.org
OTHER TRAVEL & TOURISM RELATED INFORMATION	
Text of conference presentations on travel/tourism marketing, case studies, destination promotion, etc. Quarterly articles on studies of visitor attitudes, trip behavior, travel research methodology. <i>Journal of Travel Research</i> .	Travel and Tourism Research Association; www.ttra.com

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*Inclusion in these listings does not constitute endorsement. Some of these sources charge fees for providing reports and data.



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